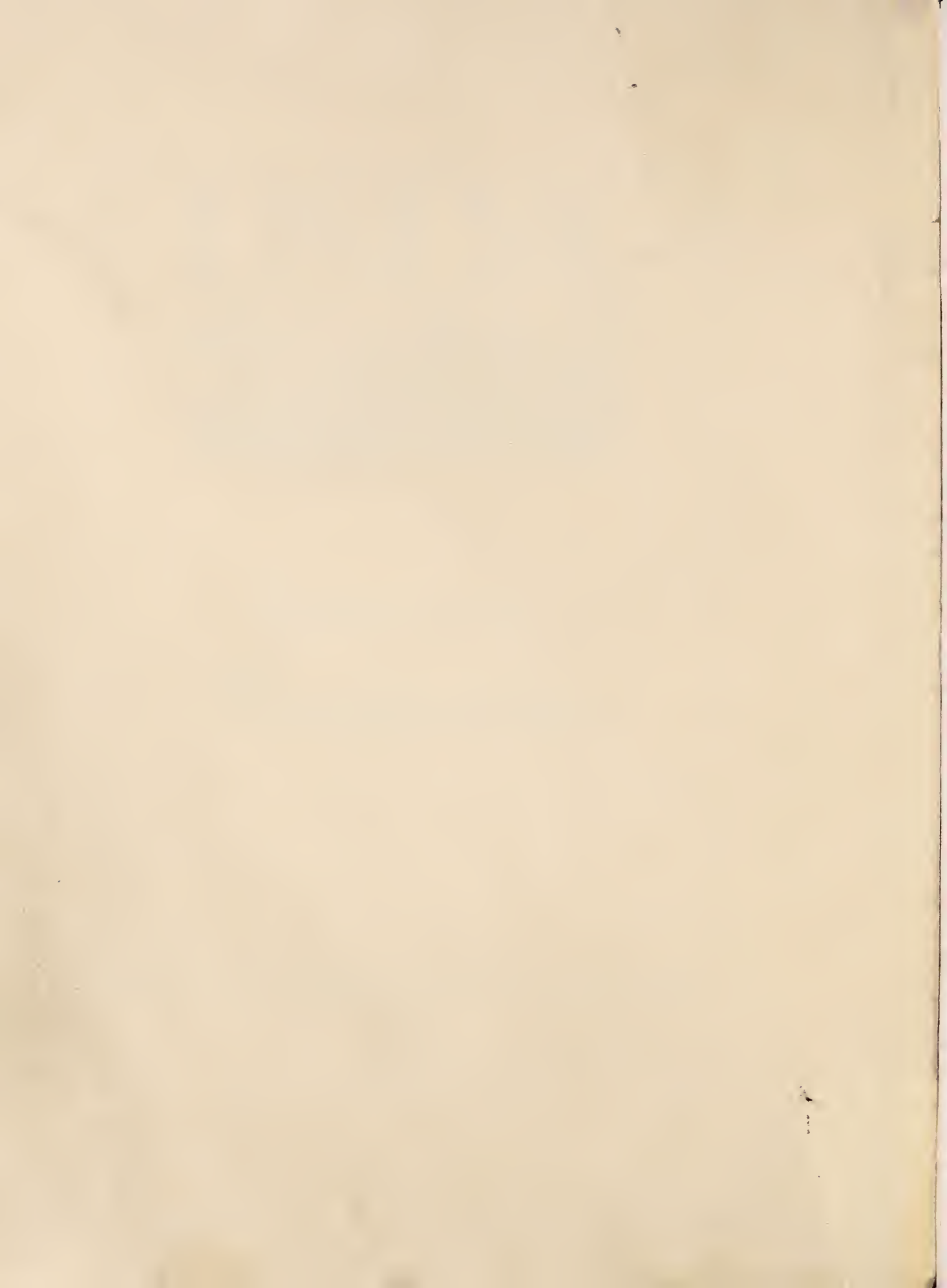


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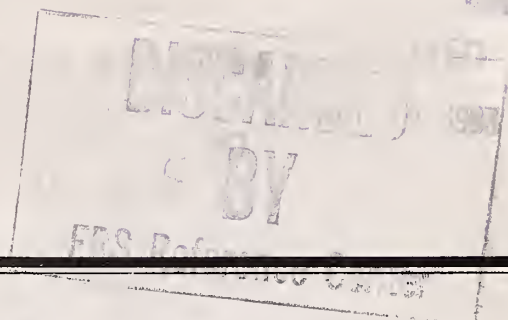
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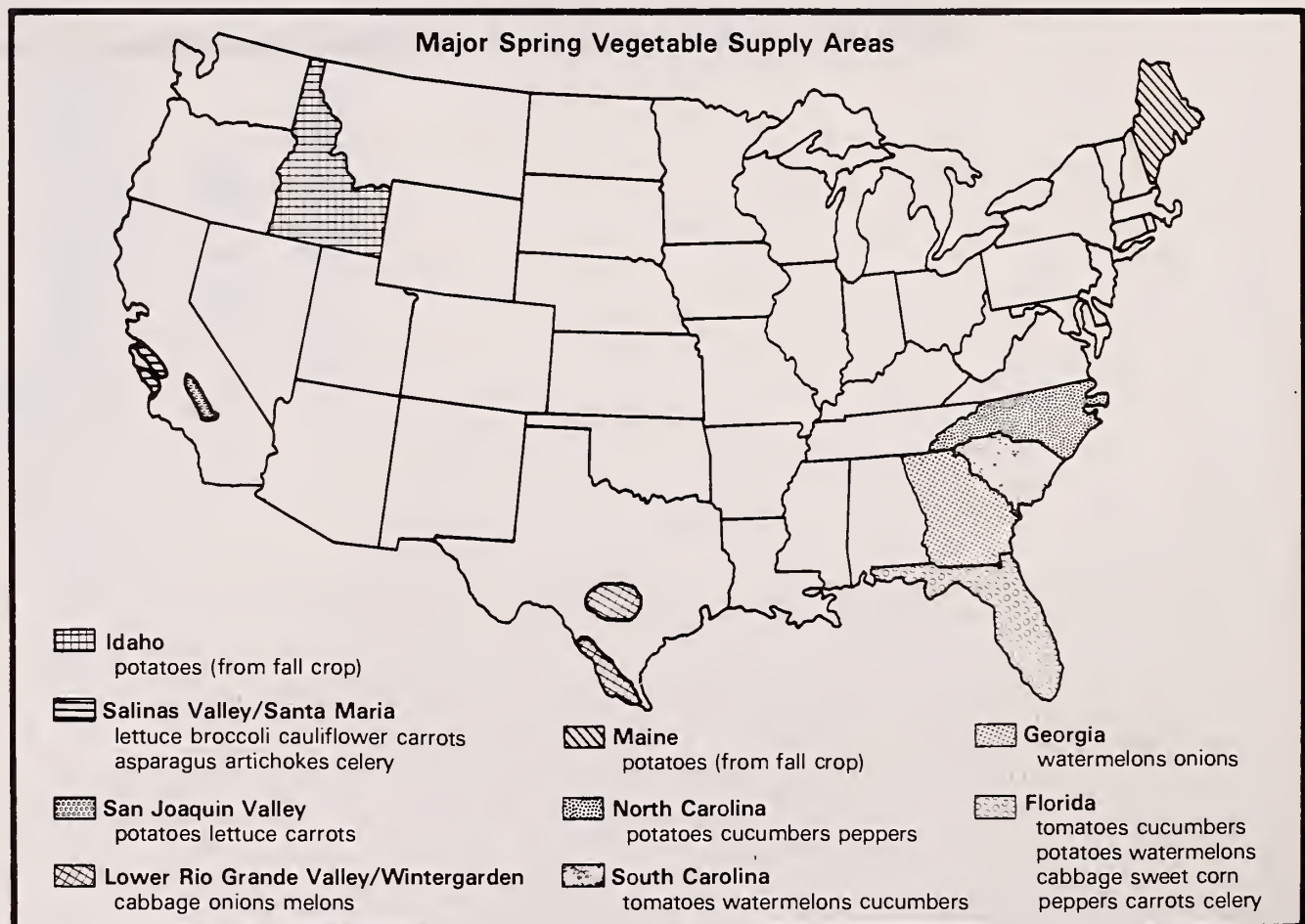
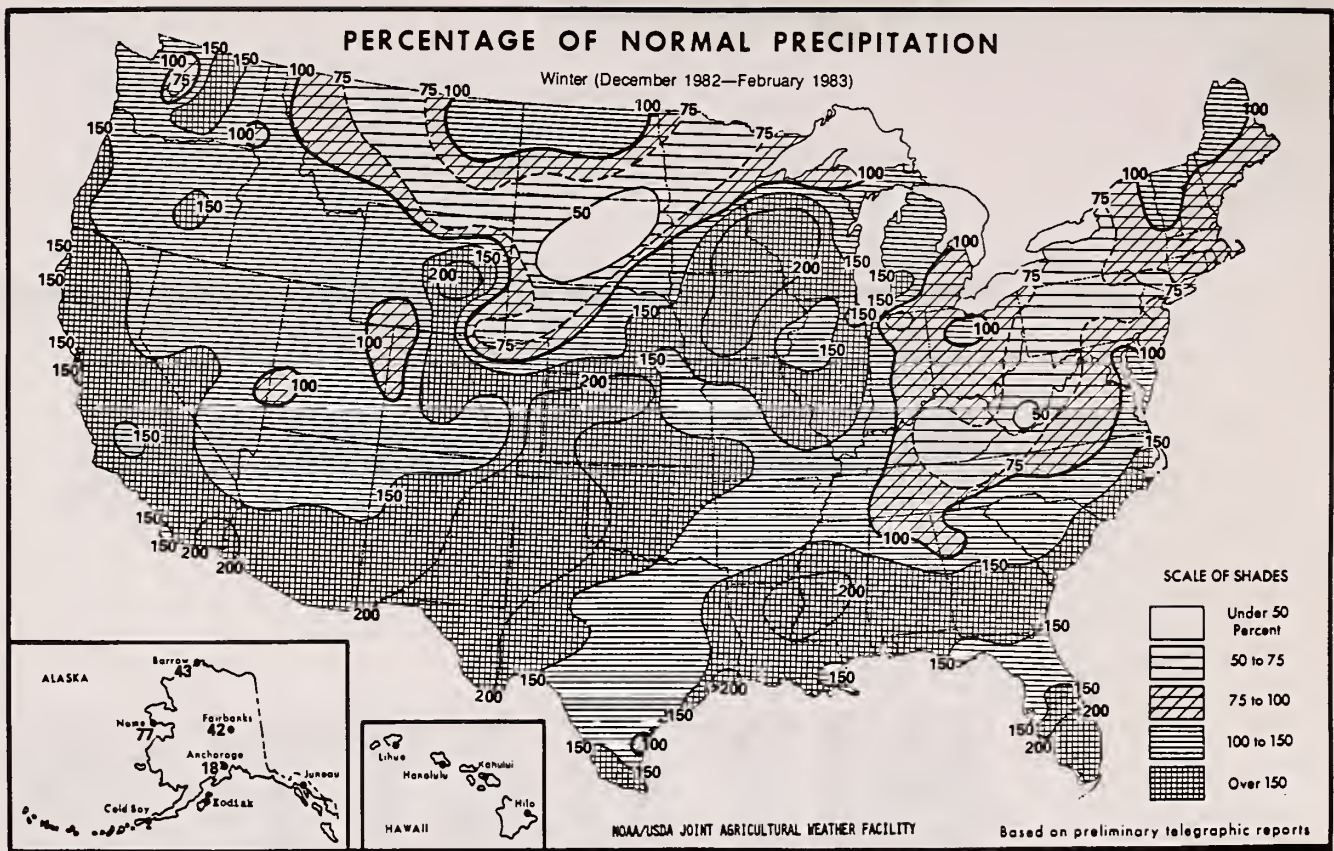


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The next summary of the Vegetable Outlook and Situation is scheduled for release on July 29. It will appear on the AGNET computer system by 3:30 ET the same day. The full text and tabular materials will be added to AGNET approximately two business days later. For more information on AGNET, call (202) 472-1892.

Summary

Wet Weather Brings Higher Fresh Vegetable Prices

Grower, wholesale, and retail prices for fresh vegetables have all risen because of rains this winter and early spring in growing areas. Particularly in Florida, California, and west Mexico, the rains disrupted planting and harvesting schedules, delayed growth, reduced yields, and hurt quality of fresh vegetables. The weather-related problems will continue to affect prices and supplies through early summer.

Fresh vegetable supplies this spring will likely decline from a year earlier. In addition, supplies of some items may be interrupted by harvesting gaps due to previous planting delays. Because of these factors, the April-June grower and retail price indexes will be higher than the January-March and could average as much as 25 percent above a year earlier. The mid-April grower price index, at 149 (1977=100), was 21 percent above a year earlier.

Mexico is an important U.S. supplier of winter and spring vegetables. Later-than-usual 1982/83 plantings will likely extend the Mexican shipping season and at least partially offset the reduction in domestic supplies this spring.

The recent wet weather has also affected the spring potato crop. The 1983 harvest is currently forecast to be down 13 percent from 1982. Rain reduced yields in important growing areas in Kern County, California, and Hastings, Florida.

After slumping since last summer, shipping point prices for fresh-market potatoes moved up strongly in late March and early April. Reasons included depletion of some fall-crop storages, as well as the prospect of reduced spring-crop supplies. In addition, demand for table potatoes has been fairly strong since the beginning of the year. Grower prices during April-June will likely

average \$5.00 to \$6.00 per cwt, compared with \$6.30 a year earlier. The retail price index for fresh potatoes this spring could average the same as a year ago or could drop by as much as 10 percent. Other factors that will influence prices include general economic conditions and their effects on potato chip and frozen french fry sales, and the timing of spring and summer crops.

Processed vegetable stocks this spring are ample. Frozen vegetable holdings on April 1 totaled 36 percent more than a year earlier and reached a record for that date. Higher stocks of canned sweet corn, tomatoes, and tomato products boosted canned vegetable holdings.

Processors of four major vegetables—snap beans, sweet corn, green peas, and tomatoes—have indicated that they intend to contract for 5 percent fewer acres in 1983. Based on the current stocks and the processors' intentions, processed vegetable prices should remain stable in the coming months.

The strength of this year's forecast economic recovery will have a big impact on demand for vegetables in coming months. Meanwhile, this year's lower expected inflation rate will help hold down increases in marketing costs and consumer prices. Lower interest rates will also help keep down the cost of financing vegetable processing. However, real interest rates are relatively high, strengthening the value of the dollar in international markets. The high-valued dollar could hamper important export sales of dry beans and dry peas in 1983.

This year's higher fresh vegetable prices should raise total cash receipts to vegetable growers. In addition, prospective higher prices for potatoes, sweetpotatoes, and dry beans late in the year will add to the gain. Receipts are currently forecast to total \$7.7 billion to \$8.0 billion for the year, compared with \$7.8 billion estimated for 1982 and the record \$8.4 billion in 1981.

Vegetable Situation

FRESH VEGETABLES

Overview and Outlook

Prices Rise as Rains Hit Winter and Spring Vegetable Areas

Heavy precipitation hit almost all U.S. winter vegetable sources, affecting planting and harvest schedules, delaying growth, reducing yields, and causing some quality problems. The wet weather contributed to a 5-

percent decline in harvest area for the spring quarter, and further effects will become evident throughout the spring.

Grower, wholesale, and retail prices for fresh vegetables generally have risen from the beginning of the year (tables 2-5). The effects of the rainy weather, and for some items lower planted acreage, pushed prices upward. Grower prices in particular were strengthened. Sharply higher prices of celery, sweet corn, and tomatoes pushed the mid-April grower price index to 149, 21 percent higher than a year earlier and 55 percent greater than January.

Table 1.—Shipments of major fresh vegetables, January-March¹

Item	Year		1983 as percentage of 1982
	1982	1983	
	<i>1,000 cwt</i>		
Lettuce	14,450	15,436	107
Tomatoes	6,793	6,575	97
Onions	6,124	6,121	100
Celery	4,379	4,509	103
Carrots	3,924	3,741	95
Cabbage	4,671	4,621	99
Peppers	1,583	1,415	89
Cucumbers	2,060	2,110	102
Squash	1,130	1,033	91
Broccoli	1,550	2,443	158
Cauliflower	741	991	132
Total	47,405	48,995	103

¹Includes shipments from Mexico.

SOURCE: AMS, USDA, Fresh Fruits and Vegetables: Weekly Summary of Shipments and Arrivals.

Table 2.—Fresh vegetables: Average U.S. f.o.b. shipping point prices

Commodity	1982		1983		
	March	April	February	March	April 1-15
	<i>Dollars per cwt</i>				
Carrots	13.20	14.10	12.40	11.00	9.89
Celery	11.20	10.60	8.32	9.93	17.60
Corn, sweet	17.70	9.10	22.30	23.00	20.60
Lettuce	14.70	15.40	7.58	8.92	12.90
Onions	13.40	12.40	6.44	9.15	12.10
Tomatoes	18.00	18.10	37.30	46.00	34.40

SOURCE: Agricultural Prices, SRS.

Grower and retail prices of fresh vegetables likely will increase this spring, both from a year earlier and from the January-March quarter. The reduced acreage and less-than-robust growing conditions should decrease supplies relative to a year ago. In addition, if some harvesting gaps occur because of earlier planting delays, prices will receive another upward jolt. Such gaps are most likely for lettuce and cauliflower.

During April-June, the index of grower prices will post a moderate to substantial gain over a year ago (table 4). Meanwhile, the retail price index will average up to a tenth higher than last year (table 5).

Winter vegetable shipments from major growing areas (including Mexico) were moderately larger than a year earlier, despite this winter's rains (table 1). A rise in acreage from a year earlier increased January-March production of lettuce, broccoli, cauliflower, and celery. California and Arizona supply the bulk of these items during winter, but the most disruptive rains didn't occur until early March. In addition, rain damage was minimal in the desert areas of those States.

Among the areas and crops affected by the rains, the following were most notable:

—The rains had a major impact in Florida on supplies of tomatoes and cucumbers.

—In California, lettuce, broccoli, cauliflower, celery, asparagus, and artichokes were the items principally affected.

—Mexico is an important supplier during the winter and spring. During February, rains in west Mexico sharply curtailed production and shipments of tomatoes, cucumbers, and bell peppers to the United States.

—The prospective area for spring-quarter harvest of seven major vegetables declined moderately from a year earlier (table 7). In addition, spring onion acreage was down in Texas (table 9).

—Field conditions in California will also affect the quantity and quality of broccoli, carrots, and celery.

—In Florida, this winter's rainy weather will likely delay harvest and cut yields of the sweet corn and tomato crops, among others. Through the first 3 weeks of April, vegetable shipments from Florida totaled 40 percent less than 2 years earlier.

April Weather Good in Florida

April weather conditions in the major spring vegetable areas included:

—Generally sunny and mild weather conditions prevailed in Florida vegetable areas during April.

—California had drying conditions through mid-April, when intermittent rains delayed some field work.

—South Carolina and Georgia vegetable crops received some freeze damage, while moist conditions delayed planting of spring and summer crops in other East Coast areas.

**Table 3.—Fresh vegetables: Representative prices (wholesale lots)
at New York and Chicago**

Market and commodity	State of origin	Unit	Tuesday nearest mid-month					
			1982		1983			
			Mar. 16	Apr. 13	Jan. 11	Feb. 15	Mar. 15	Apr. 12
Dollars								
New York								
Beans, snap, green	Florida	Bu. hamper and crt.	14.50	14.50	19.00	24.00	21.50	15.50
Broccoli, bunched	California	14's bu., ctn.	9.00	14.50	16.00	8.00	13.50	15.50
Cabbage, Domestic Round type	Florida	1-3/4 bu. crt.	8.25	8.00	5.50	4.25	5.75	6.25
Carrots:								
Topped, washed	California	48-1 lb. film bag, ctn.	12.00	10.50	12.50	10.50	9.00	8.50
Cauliflower	California	Ctn. film wrpd., 12's	15.50	21.00	19.00	11.50	14.00	16.00
Celery:								
Pascal	California	Crt. 2-3 doz.	13.50	12.50	9.25	10.00	8.50	18.50
Pascal	Florida	Crt. 2-3 doz.	9.00	10.50	—	—	—	—
Corn, sweet (yellow)	Florida	4-1/2-5 doz. crt.	—	6.50	8.50	13.00	14.00	13.00
Cucumbers	Florida	Bu. bskt.	—	10.50	—	—	—	20.00
Lettuce, Iceberg	California	2 doz. ctn.	11.50	14.00	10.00	6.50	10.00	11.00
Onions:								
Yellow, Globe, medium	New York	50-lb. sack	6.00	9.50	2.75	4.25	4.00	6.00
Yellow, Granex, large	Texas	50-lb. sack	—	9.50	—	—	—	13.00
Peppers, green	Florida	Bu. crt., large	16.50	12.50	14.50	15.00	10.00	22.50
Tomatoes, large	Florida	25-lb. ctn.	9.50	9.25	9.00	13.00	25.50	17.00
Chicago:								
Beans, snap, green	Florida	Bu. hamper and crt.	17.50	15.00	20.50	26.00	20.50	18.00
Broccoli	California	14's bu., crt.	9.00	12.00	12.00	9.00	12.50	15.00
Cabbage, Domestic Round type	Texas	1-3/4 bu. crt.	9.00	8.75	5.50	6.00	5.50	6.25
Carrots:								
Topped, washed	Texas	48-1 lb. film bag, mesh master	10.50	—	9.00	10.00	8.75	7.50
Cauliflower	California	Ctn. film wrpd. 12's	15.50	18.50	19.50	11.00	13.50	18.00
Celery:								
Pascal	California	Crt. 2-3 doz.	13.00	12.00	9.50	11.00	10.00	15.50
Pascal	Florida	Crt. 2-4 doz.	—	11.50	—	9.25	9.00	10.00
Corn, sweet (yellow)	Florida	4-1/2-5 doz. crt.	11.00	8.00	10.25	15.00	15.00	13.50
Lettuce, Iceberg type	Arizona	2 doz. head ctn.	10.50	14.00	11.25	6.75	6.75	11.50
Onions:								
Yellow, Granex, medium	Texas	50 lb. sack	9.75	—	—	—	—	10.00
Yellow, Globe medium	Midwest	50 lb. sack	7.00	6.50	4.00	—	4.75	—
Peppers, green	Florida	Bu. ctn., and crt.	—	15.00	16.00	23.00	19.00	24.00
Tomatoes, large	Florida	25 lb. ctn	12.50	9.75	10.00	13.50	24.00	17.00

SOURCE: AMS, USDA. Weekly summary of terminal market prices.

Unsettled Winter and Spring Weather Affects U.S. Vegetable Regions

Substantially above-normal amounts of precipitation have hit the United States since the beginning of the year. The cause of the breakdown in the typical weather pattern in the Southern Hemisphere was the onset of a very intense "El Nino". (The figurative translation of El Nino is Christ Child, since these unusual weather patterns typically start around Christmas.) The cause of El Nino is related to the breakdown of the semipermanent high-pressure cell off the West Coast of South America.

Normally, the counterclockwise wind pattern of the South Pacific high-pressure system and the shape of the South American coast produce a stable pattern of "prevailing southeasterlies," or trade winds. These trade winds move the warmer surface water out to sea off the coast of Peru and Ecuador and produce an upwelling of nutrient-rich cold water that supports a major world fishery.

A counter high-pressure cell west of California produces a band of prevailing northeasterly trade winds. Typically, the Northern Hemisphere's trade winds converge with the Southern Hemisphere's near the equator. This convergence zone is known to meteorologists as the

intertropical convergence zone (ITC). The portion of the ITC in the Western Pacific is the world's most stable, generally moving very little north or south over the course of the year, except in years that El Nino occurs.

As of yet, a complete understanding of the causes of El Nino is lacking. But when it occurs, the ITC moves south, and this allows the Northern Hemisphere's prevailing westerlies to also move south. The prevailing westerlies then may come over northern Mexico and southern California, instead of taking the path across northern California. This, in turn, results in an adjustment in the general storm tracks, such that, instead of the typical rainstorms of shorter duration during winter in California, more intense and enduring storms occur.

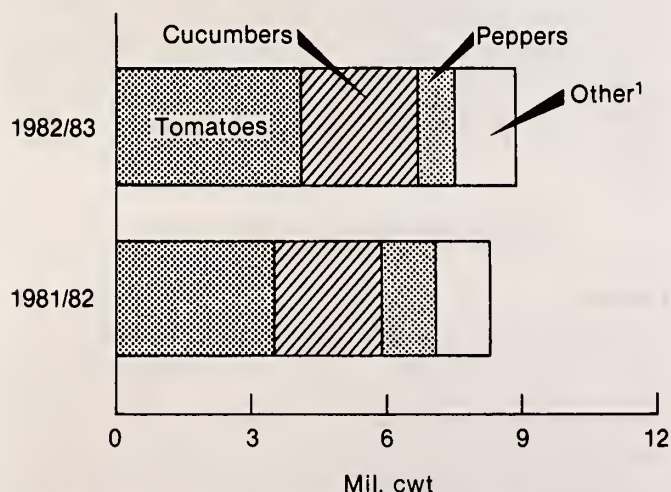
The typical duration of El Nino is from December through March or April. However, as of late April 1983, El Nino had not shown a tendency to weaken. Thus, a possibility now exists that El Nino could persist into early 1984. If this were to occur, the unsettled weather of 1983 may extend into next year. However, the weather pattern may change in the near future, and weather could return to more normal conditions by early summer.

[The situation coordinator gratefully acknowledges the information and comments provided by Norton Strommen of the World Agricultural Outlook Board.]

Rains Reduce Mexican Shipments

Mexican shipments to the United States (including tomatoes, cucumbers, bell peppers, squash, and eggplant) during January-March declined 9 percent from a year earlier. Tomato and bell pepper imports posted very sharp drops, while cucumbers rose substantially. Because of rains in February, Mexican shipments dropped off by nearly a third, but they rebounded in March. Shipments have been heavy in April, and may continue in large volume longer than normal.

Imports of Mexican Vegetables*



*Partial season - October through mid April only. Border

crossings as reported by AMS.

¹Includes squash and eggplant.

Table 4.—Quarterly index of prices received by growers for fresh vegetables¹

Year	(1977=100)				
	1st	2nd	3rd	4th	Annual
1973	81	98	74	64	79
1974	73	83	73	81	77
1975	85	93	83	90	88
1976	93	80	86	92	88
1977	128	93	84	96	100
1978	107	129	94	94	106
1979	134	105	95	101	109
1980	100	116	104	119	110
1981	163	127	121	128	135
1982	160	117	99	107	121
1983	122	² 135-145			² 115-130

¹Excludes potatoes. ²Unofficial ERS projection.

SOURCE: Agricultural Prices, SRS.

Table 5.—Quarterly retail price index of fresh vegetables¹

Year	(1967 = 100)				
	1st	2nd	3rd	4th	Annual
1973	151	167	151	137	152
1974	150	160	152	151	153
1975	168	169	165	160	166
1976	170	168	165	179	170
1977	221	216	178	184	200
1978	212	247	209	204	218
1979	254	224	211	226	229
1980	220	250	231	253	239
1981	287	275	258	248	267
1982	341	302	250	257	288
1983	292	² 300-330			² 270-310

¹Excludes potatoes. ²Unofficial ERS projection.

SOURCE: ERS index derived from Consumer Price Index.

Table 6.—Fresh vegetables: Retail price, marketing margin, and grower and packer return per unit, sold in Baltimore, indicated months, 1982 and 1983

Commodity, month and retail unit	Retail price ¹	Marketing margin		Grower and packer return (FOB shipping point price) ^{2, 3}	
		Absolute	Percentage of retail value	Absolute	Percentage of retail value
	Cents	Cents	Percent	Cents	Percent
Carrots (pound)					
January 1983	33.0	18.0	55	15.0	45
December 1982	34.0	23.3	69	10.7	31
January 1982	40.0	26.6	66	13.4	34
Celery (pound)					
January 1983	27.8	20.2	73	7.6	27
December 1982	30.1	22.5	75	7.6	25
January 1982	37.2	22.9	62	14.3	38
Cucumbers (pound)					
January 1983	68.7	36.3	53	32.4	47
December 1982	41.2	31.1	75	10.1	25
January 1982	57.3	31.6	55	25.7	45
Lettuce (head)					
January 1983	52.0	32.3	62	19.7	38
December 1982	64.0	27.0	42	37.0	58
January 1982	94.0	32.4	34	61.6	66
Onions, dry yellow (pound)					
January 1983	20.0	15.5	77	4.5	23
December 1982	22.0	17.0	77	5.1	23
January 1982	39.0	27.8	71	11.2	29
Potatoes, round white (pound)					
January 1983	16.8	12.5	74	4.3	26
December 1982	15.7	11.0	70	4.7	30
January 1982	22.8	16.0	70	6.8	30
Potatoes, Russet (pound)					
January 1983	47.0	35.0	74	12.0	26
December 1982	42.0	29.8	71	12.2	29
January 1982	47.0	32.6	69	14.4	31
Sweetpotatoes (pound)					
January 1983	23.0	13.1	57	9.9	43
December 1982	28.0	16.9	60	11.1	40
January 1982	52.0	30.4	58	21.6	42

¹Retail prices from Maryland Department of Agriculture. ²For quantity of product equivalent to retail unit sold to consumers. Because of waste and spoilage during marketing, equivalent quantity exceeds retail unit. ³Production areas: carrots-California; celery-California; lettuce-California; onions-New York; potatoes, round white-New York; potatoes, Russet-Idaho; and sweetpotatoes-North Carolina.

Mexico had been expected to ship more vegetables into the United States this winter and spring because peso devaluations made the American market attractive. Growers boosted acreage substantially.

Vegetable Prices Average Lower This Winter

The grower index averaged sharply lower during January-March than the near-record of a year earlier, when there was a Florida freeze and reduced lettuce production (table 4). Prices had slumped since last summer, and the March year-to-year rise was the first in over a year.

Although retail prices of fresh vegetables also rose through the winter and early spring, the gains were slower than for grower prices (table 5). The retail price index during first-quarter 1983 averaged 12 percent less than a year earlier (table 5). The March reading of 311 (1967=100) stood slightly above a year earlier.

Truckers' Strike Has Little Impact

This winter's truckers' strike had relatively little impact on vegetable supplies and prices. Spot shortages

of a few items and higher transportation rates caused some price increases at terminal markets.

Several factors blunted the strike's disruptive effects. The strike occurred during the time of seasonally light produce supplies, so there was a larger pool of equipment to pick up the slack left by idled truckers. Also, some supermarket chains used their own equipment. Finally, larger railroad shipments minimized shipping disruptions.

Prospects For Leading Items

Lettuce

Spring lettuce area for harvest totaled 43,000 acres, 300 less than a year ago. Acreage in California's important central coast region—primarily the Salinas Valley—is down 15 percent. A harvest gap is possible later this spring in the Salinas Valley because of planting delays, although good weather between now and then would lessen the gap. In late spring, that area will be the principal U.S. supplier. In addition, growers can harvest smaller heads if adequate crop and market condi-

Table 7.—Fresh vegetables: Reported acreage of principal crops

Seasonal group and crop	Prospective area for harvest		
	1982 major States	1983	
		Indicated major States	Percent of 1982
	1,000 acres		Percent
Winter	134.3	154.8	115
Spring			
Broccoli ¹	24.4	18.0	74
Carrots ¹	9.6	7.9	82
Cauliflower ¹	8.1	6.5	80
Celery ¹	9.7	8.6	89
Sweet corn	36.9	38.8	105
Lettuce	43.3	43.0	99
Tomatoes	29.7	31.0	104
Total 7 vegetables ²	161.7	153.8	95
Honeydew melons	4.9	5.5	112

¹Includes fresh market and processing. ²May not add to total due to rounding.

SOURCE: Vegetables, SRS.

tions exist. Some of the Salinas Valley lettuce was planted on higher ground because of water problems on the Valley floor, and this could reduce yields.

Lettuce prices could be very volatile this spring because of the anticipated decline in Salinas Valley production and possible gaps. But, relatively good conditions in other Western growing areas, where acreage rose from last year, could mitigate those effects.

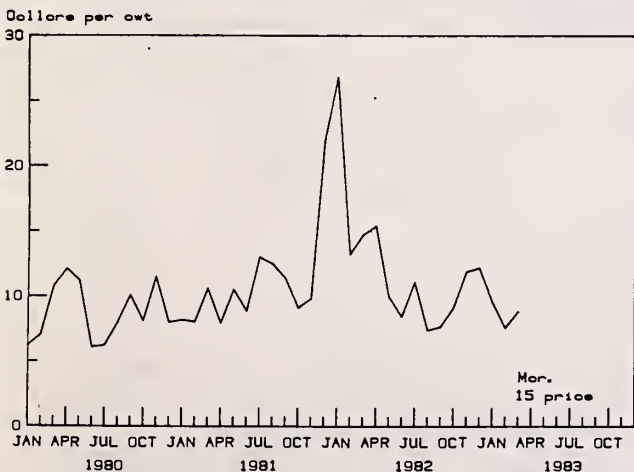
Recent lettuce price developments include:

—Shipping point prices averaged much lower during January-March than a year earlier. Prices were typically in the range of \$3 to \$4.50 per carton.

—The retail price index this winter fell 33 percent from last year. Increased supplies kept prices low.

—During April, lettuce traded for \$4 to \$8 per carton in California, compared with \$4 to \$19 last year.

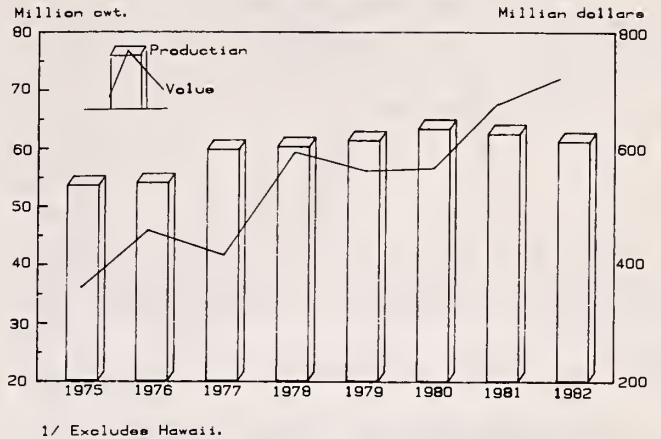
Lettuce: F.O.B. Shipping Point Prices



USDA

Neg ERS 1059-83 (4)

Lettuce: U.S. Production and Value 1/



1/ Excludes Hawaii.

USDA

Neg ERS 298-83 (4)

Table 8.—Major sources of U.S. winter tomato supplies

Season	Florida	Mexico ¹	Other	Total	Mexico as percent of total
Nov. 1 thru mid-April					
	Thous. cwt.			Percent	
1980/81	5,298	3,653	1,927	9,878	37
1981/82	6,625	4,102	1,180	11,907	34
1982/83	6,556	4,318	942	11,816	37

¹Border crossings include shipments to Canada.

SOURCE: Fresh Fruit and Vegetables: Weekly Summary of Shipments and Arrivals, AMS.

Tomatoes

Spring tomato acreage is moderately above a year ago because of an increase in Florida's Palmetto-Ruskin area. Fruit set there was below normal in mid-April, and yields from early fields will probably be low. Combined acreage in the other spring States was slightly less than a year ago. Rains delayed plantings in South Carolina and Alabama.

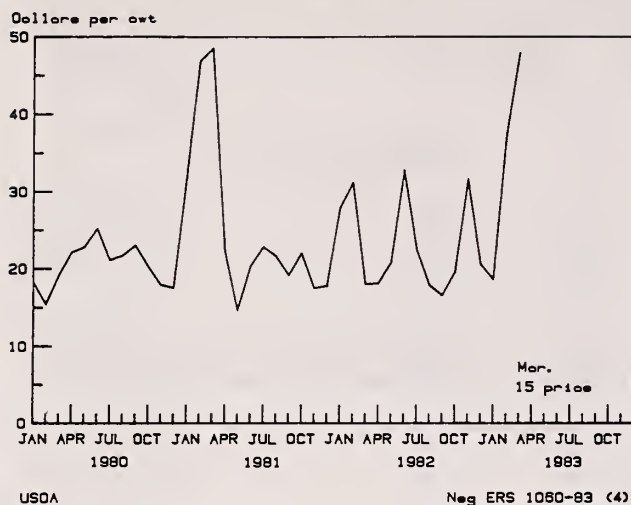
Tomato prices could continue above a year ago through mid-May, when the crop from Palmetto-Ruskin comes to market in volume. Mexican shipments in April were sharply ahead of a year earlier. Mexican growers reportedly had some late plantings and will ship to the United States longer than a year ago. This could offset any reduction in domestic supplies.

Florida shipping point prices started rising in January and have remained relatively high since. March prices in particular were high, as 25-pound cartons of mature green tomatoes traded at \$15 to \$20. Three major factors contributed to the price runup. A Florida planting gap in December manifested itself in reduced supplies in March. Also, February rains reduced yields in Florida. Finally, winter rains in Mexico sharply reduced the output there through early March.

Other tomato supply and price highlights include the following:

—Rain reduced supplies from Florida and Mexico and caused a decline in tomato shipments during January-

Tomatoes: F.O.B. Shipping Point Prices



March. Seasonal shipments through mid-April were running nearly equal to last year (table 8).

—The retail price index for tomatoes this winter averaged 8 percent more than a year earlier.

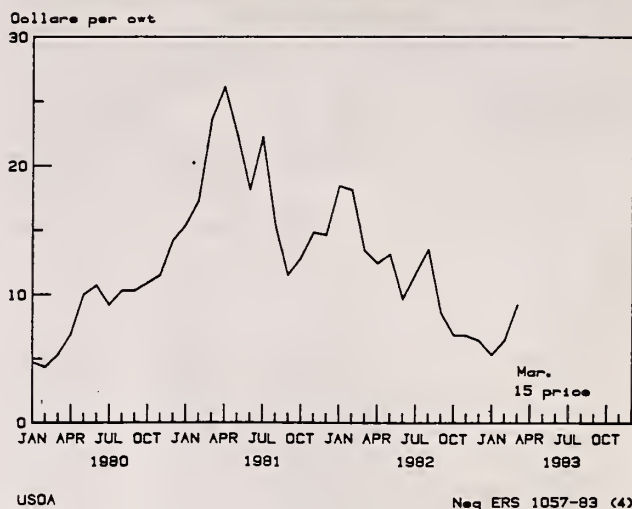
—During April, Florida tomatoes traded for \$13 to \$20 per carton at shipping points, compared with \$6 to \$8 a year ago.

Onions

Because of the record 1982 onion crop, grower and retail prices had slumped since mid-1982. However, good demand, a depletion of storage stocks, and a smaller spring onion crop forecast in Texas sent prices upward late this winter and early spring. The higher prices could persist through the spring because combined spring onion harvest acreage in California and Arizona is unchanged from last year (table 9).

As of March, growers of summer-crop onions intended to reduce their 1983 plantings by 5 percent from a year

Onions: F.O.B. Shipping Point Prices



ago. A smaller crop this year would probably keep onion prices in second-half 1983 above a year earlier.

Other recent onion developments include the following:

—Shipments during January-March increased 7 percent from a year earlier, because of lower shipping point prices due to the large 1982 storage crop and increased imports from Mexico.

—At Western shipping points, compared with a year earlier, onions traded at \$8 to \$10 less per 50-pound sack through mid-February. Eastern onion f.o.b. shipping point prices were about \$3 to \$5 less.

—Retail prices of dry yellow onions averaged about 23 cents a pound during January-March, down from about 39 cents a year earlier.

Other Vegetables

—Celery area for harvest this spring is down substantially from a year ago because many fields in California

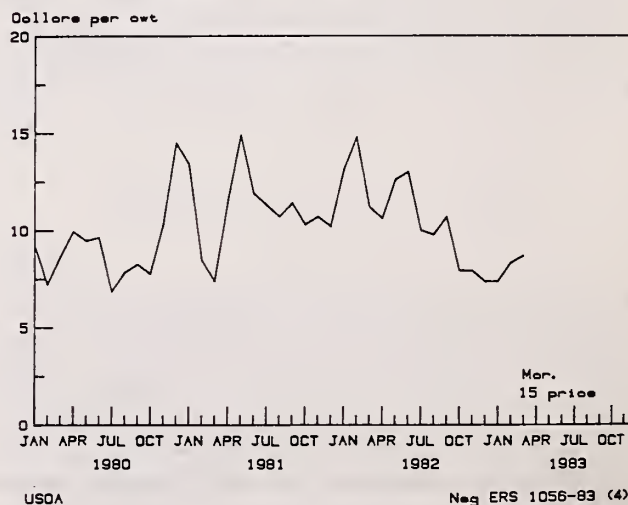
Table 9.—U.S. onion acreage by seasonal group

Season	Area			1983 as percent of 1982
	1981	1982	1983	
Acres				
Spring ¹				
Arizona	1,100	1,700	1,500	88
Texas	18,000	19,400	16,300	84
California	6,000	7,900	8,100	102
Season total	25,100	29,000	25,900	89
Summer				
Non-storage ²	11,650	12,800	9,900	77
Storage ²	54,510	56,580	55,730	98
California ^{2, 3}	22,300	30,100	29,200	97
Total Spring and Summer	113,560	128,480	120,730	94

¹Data are current estimate of area for harvest. ²1983 data are intentions to plant as of March. ³Primarily for processing.

SOURCE: Vegetables, SRS.

Celery: F.O.B. Shipping Point Prices



were too wet for soil preparation and planting. Shipping point prices in mid-April, at \$14 to \$18 per crate, were more than double a year ago. Prices will likely remain relatively high through the spring.

—The rains in California have decreased supplies of asparagus and artichokes, which are very seasonal items. Domestic shipments were running slightly behind last year's pace, but prices were substantially higher.

—Honeydew melons continue to gain in popularity. This spring's harvest acreage (primarily in Texas) is forecast at 12 percent above 1982 and 38 percent above 1981. Open weather in Texas minimized planting delays and promoted good growth.

—Planted area of watermelons in Florida, the major spring supplier, rose 9 percent from last year. Because of the adverse weather this year, yields are expected to be much below average.

PROCESSED VEGETABLES

Overview and Outlook

Supplies Ample, Prices Steady

Total 1982/83 supplies of canned vegetables rose slightly from 1981/82, while supplies of frozen jumped substantially (tables 10 and 11). The large supplies and weak demand have contributed to slower rises, or even decreases, in the wholesale and retail price indexes for processed vegetables since last summer (tables 14-16).

Table 10.—Canned vegetable supplies and disappearance¹

Year	Pack and carryover	Disappearance
<i>Million cases 24/303's</i>		
1979/80	322	266
1980/81	301	253
1981/82	282	237
1982/83 ²	290	

¹Eight items—lima beans, snap beans, beets, sweet corn, green peas, sauerkraut, tomatoes, and tomato juice. ²Unofficial ERS estimate.

SOURCES: National Food Processors Assn. and National Kraut Packers Assn.

Table 11.—Frozen vegetable supplies and disappearance¹

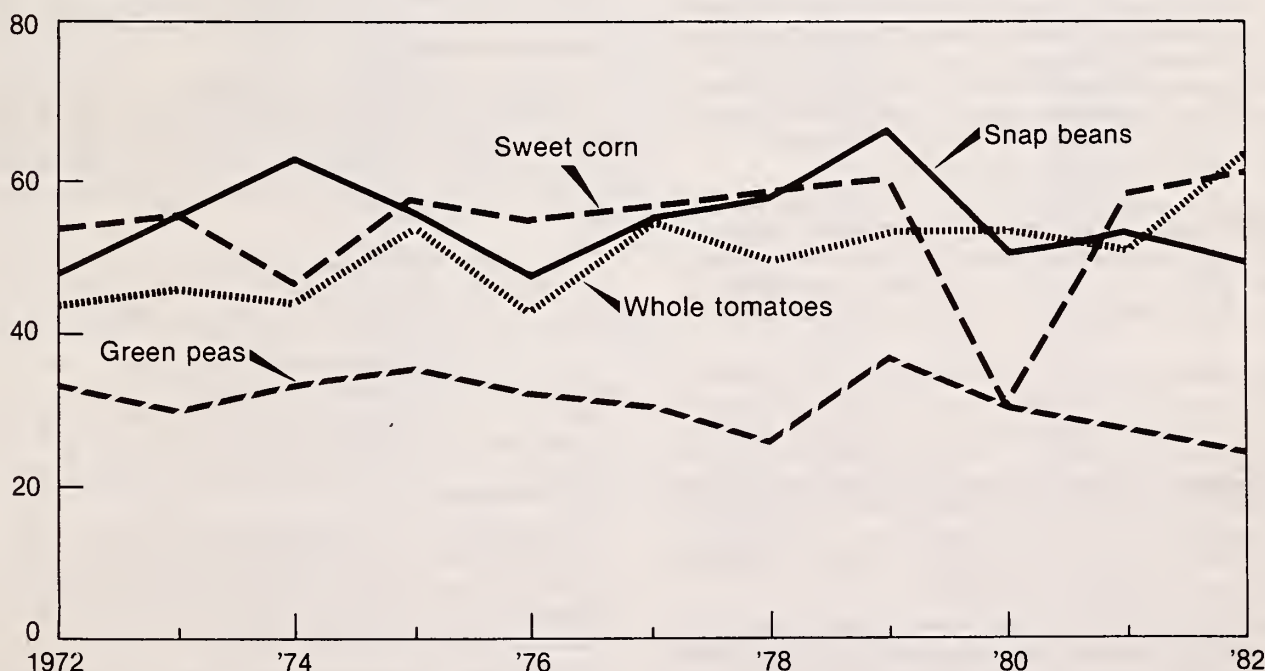
Year	Pack and carryover	Disappearance
<i>Million pounds</i>		
1979/80	2,791	2,156
1980/81	2,539	2,116
1981/82	2,578	2,181
1982/83 ²	2,936	

¹Eight items—lima beans, snap beans, broccoli, carrots, cauliflower, sweet corn, green peas, and spinach. ²Projected based on American Frozen Food Institute data.

SOURCES: Cold Storage, SRS, and American Frozen Food Institute.

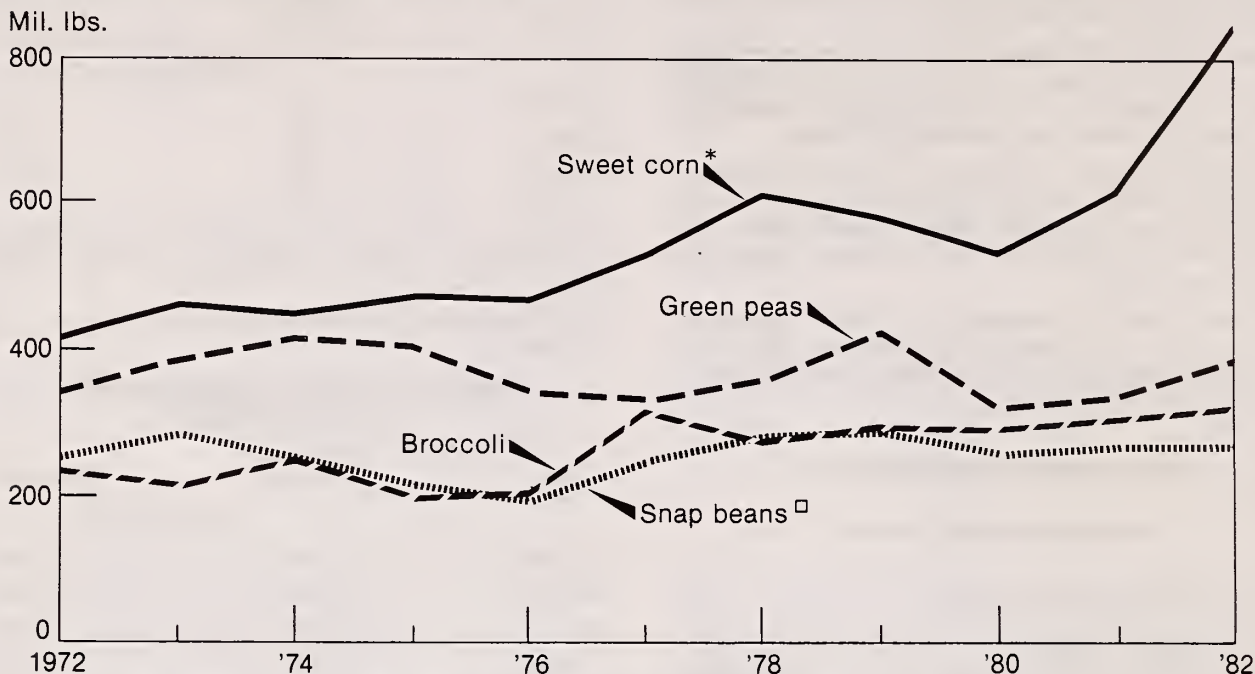
Selected Canned Vegetable Packs

Mil. cases



Source: National Food Processors Association.

Selected Frozen Vegetables Packs



*Cut corn and corn-on-cob. □ Includes french, italian green beans and wax beans.
Source: American Frozen Food Institute.

USDA

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Slower rises in marketing costs also steadied processed vegetable prices over the past year.

Processors of four major vegetables (snap beans, sweet corn, green peas, and tomatoes) intend to contract for 5 percent fewer acres in 1983 than in 1982 (table 18). Based on the canners' March intentions, the combined supply of canned snap beans, sweet corn, and green peas could be moderately less than a year ago and the smallest since at least the early 1970's. Meanwhile, the frozen supply of those three items could exceed 1982/83's record. Tomato products should also be in good supply if the canners' tonnage intentions are realized.

The current ample holdings of both canned and frozen vegetables should extend the pattern of steady prices at least through early summer, when 1983/84 crop prospects become clearer. In addition, moderating increases in marketing costs will continue to help keep a lid on price rises.

During April-June 1983, the wholesale price indexes for both canned and frozen vegetables, and the retail index for processed vegetables, will average slightly higher than a year earlier. For all of 1983, the rise in the wholesale indexes for canned and frozen vegetables will probably be the smallest since 1976. Retail prices for processed vegetables will probably rise 1 to 3 percent during 1983, compared with a 2- to 4-percent increase forecast for retail prices of all foods.

Canned snap bean and green pea holdings were relatively small this spring, indicating prices of those items could firm up somewhat until new pack supplies are available. Tomato paste stocks were also relatively tight. Rains in California and their potential effects on the harvest there of broccoli, cauliflower, and spinach could move prices of those items up in the coming months.

Other supply and price highlights of the processed vegetable situation include the following:

- Frozen vegetable stocks (excluding potatoes) on April 1 totaled a record high for that date, and 36 percent above a year earlier (table 12). The larger 1982 packs, especially of sweet corn, broccoli, green peas, and lima beans, caused the stocks rise.

- Combined 1982/83 disappearance of three major frozen items (snap beans, sweet corn, and green peas) through April 1 was slightly larger than a year earlier. Sharply higher movement of corn—especially corn-on-the-cob—offset a decline in sales of snap beans and green peas.

- The large 1982 packs of tomato products and sweet corn propelled a substantial rise from a year earlier in canners' recent holdings of canned vegetables (table 13).

- Canners' shipments during 1982/83 have risen from a year earlier for most concentrated tomato products, while canned tomato shipments are about the same. Disappearance of the three major canned side-dish items (snap beans, sweet corn, green peas) is running slightly behind last year's pace.

- During first-quarter 1983, the year-to-year changes in the wholesale index for canned vegetables rose 1 percent from a year earlier, the wholesale index for frozen vegetables rose 2 percent, and the retail index for processed vegetables showed no change.

- The ERS marketing cost index, influenced by moderating cost increases for labor and packaging, averaged only 5 percent higher in 1982 than a year earlier—the smallest gain since 1968. The March 1983 reading was only 3-percent above a year earlier.

Table 12.—Frozen vegetables: Cold storage holdings and indicated disappearance

Commodity	April 1			Net change Jan. 1-April 1		
	1981	1982	1983	1981	1982	1983
<i>Million pounds</i>						
Asparagus	5	3	6	-3	-2	-3
Lima beans	60	32	51	-31	-30	-24
Snap beans	121	105	133	-69	-73	-71
Broccoli	73	67	74	-26	-17	-33
Brussels sprouts	39	35	36	-16	-16	-10
Carrots	91	112	178	-46	-39	-34
Cauliflower	46	39	53	-24	-18	-16
Sweet corn	201	205	382	-159	-149	-176
Mixed vegetables	40	45	50	-5	2	-3
Okra	16	15	33	-17	-14	-19
Onions	25	25	32	-3	-4	2
Blackeyed peas	5	7	8	-4	-4	-4
Green peas	122	94	137	-105	-86	-110
Peas and carrots	10	9	10	-1	-1	-1
Spinach	63	62	39	9	-2	-14
Squash	21	23	33	-11	-15	-13
Southern greens	26	24	26	-3	-6	-7
Other vegetables	158	159	158	-28	-42	-32
Total vegetables ²	1,122	1,061	1,439	-541	-515	-569
Potatoes	774	846	900	44	157	132
Grand total ²	1,896	1,907	2,339	-497	-357	-437

¹Preliminary. ²May not add to total due to rounding. ³Less than 0.50.

SOURCE: Cold Storage, SRS, USDA.

Table 13.—Canned vegetables: Commercial packs and canners' stocks by commodities

Commodity	Pack		Canners Stocks		
	1981	1982	Date	1982	1983
<i>1,000 cases 24/303's</i>					
Side-dish commodities					
Asparagus	2,844	2,727	Mar. 1	648	868
Lima beans	2,602	2,275	Mar. 1	1,499	1,058
Snap beans	52,808	48,832	Mar. 1	28,099	23,703
Beets	9,555	10,049	Jan. 1	9,365	9,421
Carrots	4,639	4,525	Jan. 1	3,632	4,210
Sweet corn	57,949	60,522	Mar. 1	24,725	29,749
Green peas	27,296	24,790	Mar. 1	13,111	9,741
Sauerkraut	13,289	10,880	Mar. 1	6,530	7,557
Spinach	5,458	NA	Mar. 1	3,301	NA
Total ¹	170,982	164,600		87,609	86,307
Tomato items					
Whole tomatoes	51,937	63,089	Jan. 1	28,461	39,938
Tomato juice ²	17,507	23,955	Jan. 1	11,457	16,958
Tomato paste ³	16,436	19,672	Jan. 1	2,414	2,698
Total	85,880	87,044		42,332	59,594
Total side-dish and tomato items ¹	256,862	251,644		129,941	145,901

¹Doesn't include spinach. ²Includes combination vegetable juices containing at least 70 percent tomato juice. ³1,000 cases 6/10's. N.A. = not available.

SOURCE: National Food Processors Association and National Kraut Packers Association.

Table 14.—Quarterly wholesale price index for canned vegetables

Year	1st	2nd	3rd	4th	Annual
1967=100					
1978	173.4	177.1	181.3	183.0	178.7
1979	184.0	185.6	189.1	188.0	186.7
1980	186.8	190.6	198.9	207.3	195.9
1981	213.7	223.5	232.1	239.0	227.1
1982	241.7	242.9	241.8	240.7	241.8
1983	242.4	¹ 245.0			¹ 240-250

¹Unofficial ERS projection.

SOURCE: Producer Price Index, Bureau of Labor Statistics

Table 15.—Quarterly wholesale price index for frozen vegetables

Year	1st	2nd	3rd	4th	Annual
1967=100					
1978	196.3	197.4	203.4	206.2	200.9
1979	206.1	207.6	213.5	216.5	210.9
1980	214.6	220.5	227.5	226.6	222.3
1981	228.7	249.7	263.0	270.8	253.1
1982	275.7	278.7	282.7	283.0	280.0
1983	282.3	¹ 283.0			¹ 280-290

¹Unofficial ERS projection.

SOURCE: Producer Price Index, Bureau of Labor Statistics

Table 16.—Quarterly retail price index of processed vegetables

Year	1st	2nd	3rd	4th	Annual
December 1967=100					
1978	101.7	102.8	104.6	106.0	103.8
1979	107.5	108.5	110.8	111.2	109.5
1980	113.9	115.3	118.8	122.0	117.5
1981	125.6	130.4	135.4	136.1	131.9
1982	137.8	138.8	140.1	138.7	138.9
1983	137.9	¹ 140.0			138-144

¹Unofficial ERS projection.

SOURCE: Consumer Price Index, Bureau of Labor Statistics.

—The retail price index in March dipped below a year earlier for the first time in nearly 6 years.

Less Processing Acreage Likely in 1983

Processors of the four major vegetable crops (snap beans, sweet corn, green peas, and tomatoes) this year intend to contract for 5 percent fewer acres than in 1982 (table 18).

In light of the huge frozen stocks now on hand, the 3 percent drop in frozen vegetable acreage was surprisingly small. The small size of the decline may reflect freezers' expectations of stronger demand in 1983/84, lower pack

Table 17.—Processed vegetables: Retail price, marketing margin, and farm value per unit, sold in Baltimore

Commodity, month, and retail unit	Retail price ¹	Marketing margin		Farm value ^{2, 3}	
		Absolute	Percentage of retail price	Absolute	Percentage of retail price
		Cents		Cents	
Frozen beans (9 oz.)					
January 1983	57.0	51.4	90	5.6	10
October 1982	57.0	51.4	90	5.6	10
January 1982	56.0	50.6	90	5.4	10
Canned corn (303)					
January 1983	53.0	45.6	86	7.4	14
October 1982	48.0	40.7	85	7.3	15
January 1982	50.0	42.0	84	8.0	16
Frozen corn (10 oz.)					
January 1983	58.0	50.0	86	8.0	14
October 1982	48.0	40.1	84	7.9	16
January 1982	51.0	43.4	85	7.6	15
Canned peas (303)					
January 1983	44.0	36.2	82	7.8	18
October 1982	44.0	36.2	82	7.8	18
January 1982	50.0	41.9	84	8.1	16
Frozen peas (10 oz.)					
January 1983	62.0	54.2	87	7.8	13
October 1982	62.0	54.2	87	7.8	13
January 1982	54.0	47.4	88	6.6	12
Canned tomatoes (303)					
January 1983	53.6	48.4	90	5.2	10
October 1982	53.7	48.6	91	5.1	9
January 1982	55.4	50.5	91	4.9	9

¹Retail prices from Maryland Department of Agriculture. ²For quantity of product equivalent to retail unit sold to consumers. Because of waste and spoilage during processing and marketing, equivalent quantity exceeds retail unit. ³Production areas: beans (frozen) Western; corn (canned) Midwest; corn (frozen) Western; peas (sweet, canned) Midwest; peas (frozen) West; tomatoes (canned) California.

Table 18.—Processing vegetables: Planted and prospective acreage

Crop	1981 total	Planted acreage 1982		Prospective 1983 contract	1983 as percentage of contract 1982
		Total	Contract		
Snap beans					
Freezing	59.0	63.1	58.7	56.3	96
Canning	171.6	150.2	142.0	128.1	90
Total	230.6	213.3	200.7	184.4	92
Sweet corn					
Freezing	131.2	159.9	159.2	150.1	94
Canning	292.6	295.4	294.4	258.5	88
Total	423.8	455.3	453.6	408.6	90
Green peas					
Freezing	128.1	156.3	156.3	156.2	100
Canning	187.5	162.1	162.1	172.4	106
Total	315.6	318.4	318.4	328.6	103
Total 3 crops					
Freezing	318.3	379.3	374.2	362.6	97
Canning	651.7	607.7	598.5	559.0	93
Total	970.0	987.0	972.7	921.6	95
Tomatoes (Tomato production in 1,000 tons)	5,716.1	7,299.0	7,093.3	7,312.5	103
Total 4 crops	1,228.5	1,304.6	1,280.5	1,217.0	95

SOURCE: Vegetables, SRS.

finance costs because of reduced interest rates, and lower yields than in 1982, when nearly ideal growing conditions prevailed.

Opposite the frozen vegetable situation, canners had been expected to increase their contract area because of the tight stocks of canned snap beans and canned peas. However, the acreage decline is consistent with the longer-term trend of reduced per capita consumption of canned vegetables.

California tomato canners expect to contract for 6.4 million tons, 6 percent more than in 1982, to offset a decline of 11 percent in other States. The effects of the California rains could reduce output below the canners' intentions.

Area for spring harvest of the dual-use crops of broccoli, cauliflower, and carrots is nearly a fourth less than last year. Frozen stocks of the three items (and canned stocks of carrots) on April 1 totaled substantially more than a year earlier, and may have contributed to the decline. In addition, wet field conditions in California's central coast region prevented planting of some broccoli and cauliflower acreage.

Prospects for Leading Items

Green Peas

Canners intend to contract for 6 percent more acreage this year. In the past 8 years, however, canners' intentions have always been greater than actual acreage. Based on recent yields and normal crop abandonment and production-pack relationships, this year's pack should rise between 5 and 12 percent from a year ago. The larger pack will offset a reduced carryover and probably leave the 1983/84 supply close to 1982/83's. Because current stocks are tight, wholesale prices could rise before new pack supplies become available. However,

**Table 19.—Canned green peas:
Supply and disappearance**

	1980/81	1981/82	1982/83
	<i>Million cases 24/303's</i>		
Carryover	6.2	6.2	5.8
Pack	30.1	27.3	24.8
Total supply	36.3	33.5	30.6
Disappearance	30.1	27.7	¹ 27-28

¹Unofficial ERS estimate.**Table 20.—Frozen green peas:
Supply and disappearance**

	1980/81	1981/82	1982/83
	<i>Million pounds</i>		
Carryover	122.5	68.8	55.0
Pack	315.6	333.9	404.8
Total supply	438.0	402.7	459.8
Disappearance	369.2	347.7	¹ 348-358

¹Unofficial ERS estimate.

er, with 1983/84 supplies likely to be similar to 1982/83, prices should be fairly steady through calendar 1983.

Other canned pea highlights include:

—Canners' stocks on March 1 totaled 26 percent less than a year earlier, primarily reflecting last year's small pack (table 13). Total seasonal shipments gained slightly through February.

—Despite the tight holdings, Midwest canners' wholesale prices of retail-size cans in April, at \$6.50 a case,

were similar to a year earlier. Foodservice cans, at \$10.75 a case, were about \$1 higher.

The projected 1983/84 carryin stocks of frozen peas are about 85 million pounds, more than 50 percent above 1982/83. Meanwhile, expected frozen pea acreage this year nearly equals last year's. With a more normal production-pack relationship and an increase in beginning stocks, 1983/84 frozen pea supplies could rise by as much as 10 percent. Therefore, no major price surges are expected through the end of the year.

Other frozen pea highlights include:

—Frozen stocks were 46 percent above a year earlier on April 1 (table 12). Seasonal disappearance through March fell 3 percent.

—Wholesale prices of frozen retail and foodservice cases in April listed at \$8.20 per case and 51 cents a pound, respectively, although some discounts from list were available. These prices compare with lists of \$7.80 and 49 cents a year ago.

Sweet Corn

Sweet corn canners in March intended to contract for 12 percent less area in 1983 (table 18) than last year. This suggests that this year's production and pack could decline 15 to 20 percent from 1982. Carryin stocks for 1983/84 could be 50 percent larger than for 1982/83, but that would not offset the expected pack decrease. Supplies for 1983/84 will likely be 5 to 7 million cases lower than for 1982/83, which could force some price jumps later this year.

Other canned corn highlights include:

—Canned sweet corn stocks on March 1 stood a fifth higher than a year ago (table 13), while canners' seasonal shipments through February were unchanged. A record-large pack in 1982 boosted the stocks total.

—Because of the large stocks, Midwest canners this spring traded retail size cases at \$7 a case, the lowest in

3 years, while foodservice cases sold at \$11.25, compared with \$13 a year earlier.

The combined carryover stocks of cut and cob corn for 1983/84 will likely reach a record high. However, freezers indicated only a 6-percent cutback in their planting intentions. If freezers follow through on their intentions, 1983/84 total supplies would probably exceed the record 1982/83 supply. The current large stocks of frozen corn, and the prospects for large 1983/84 supplies, will probably continue to pressure prices downward. Some price strength may be seen for cob corn, which continues to be a growth item—especially with the foodservice trade.

Other frozen corn highlights include:

—On April 1, frozen stocks of cut corn and cob corn were sharply above a year earlier (table 12). Seasonal demand for cob corn has been robust, running 21 percent ahead of the 1981/82 pace through March. Meanwhile, 1982/83 disappearance of cut corn was 3 percent more.

—Wholesale list prices of cut corn equaled those of a year earlier in April, but generally traded for less. Meanwhile, retail sizes of cob corn traded at about 75 cents per case more, while prices of foodservice packs were listed the same as a year ago but at times sold for less.

Snap Beans

In spite of reduced holdings, snap bean canners in March intended to cut their contract area by a tenth from 1982. That acreage decline, along with a likely lower carryover, indicates the 1983/84 supply could be the lowest since 1972/73, portending higher prices in the coming year.

Other canned bean highlights include:

—Canned snap bean supplies on March 1 were substantially lower than a year ago (table 13). Shipments during 1982/83 were running 5 percent behind a year ago through March.

**Table 21.—Canned sweet corn:
Supply and disappearance**

	1980/81	1981/82	1982/83
<i>Million cases 24/303's</i>			
Carryover	9.6	4.7	7.3
Pack	50.6	57.9	60.5
Total supply	60.2	62.7	67.8
Disappearance	55.4	55.4	¹ 55-58

¹Unofficial ERS estimate.

**Table 22.—Frozen sweet corn:
Supply and disappearance**

	1980/81	1981/82	1982/83
<i>Million pounds</i>			
Carryover	120.3	54.8	¹ 65.0
Pack	529.1	619.4	834.3
Total supply	649.4	674.2	899.3
Disappearance	594.6	609.2	¹ 680-710

¹Unofficial ERS estimate.

**Table 23.—Canned snap beans:
Supply and disappearance**

	1980/81	1981/82	1982/83
<i>Million cases 24/303's</i>			
Carryover	11.3	15.9	12.4
Pack	60.9	51.6	¹ 49.4
Total supply	72.2	67.5	61.8
Disappearance	56.3	55.2	¹ 52-54

¹Unofficial ERS estimate.

**Table 24.—Frozen snap beans:
Supply and disappearance**

	1980/81	1981/82	1982/83
<i>Million pounds</i>			
Carryover	91.2	80.9	68.8
Pack	236.5	247.9	¹ 281.4
Total supply	327.7	328.8	¹ 350.2
Disappearance	246.8	260.3	¹ 235-250

¹Unofficial ERS estimate.

—Despite the lower stocks, retail-size cases of canned green beans, at \$5.50, were the lowest in 5 years. However, foodservice cases traded at \$8.50 in April, up from \$7 a year earlier.

The 1983/84 carryin stocks of frozen snap beans will probably be about a third larger than 1982/83. Freezers expect to contract for 4 percent less acreage in 1983. Based on average crop losses, recent yield trends, and the projected carryover, the 1983/84 frozen snap bean supply would probably be moderately above 1982/83. The current and prospective supply situations suggest steady prices in the months ahead.

Other frozen bean highlights include:

—Frozen stocks of green beans were sharply above a year earlier on April 1 (table 12). The indicated seasonal disappearance through March totaled 12 percent less.

—This spring, freezers wholesaled both regular and french cuts at \$7.95 per retail-size case, the same as a year ago. Prices of foodservice cartons ranged from 45 to 50 cents a pound, compared with 50 cents a year earlier.

Tomato Products

Stocks of canned tomatoes and tomato products on January 1 were generally above last year's very tight holdings. Despite generally ample stocks, canners indicated in March they would contract for 3 percent more tonnage in 1983 (table 18). California contract tonnage could total 6.35 million, up 6 percent. Expected tonnage in the remaining States fell 11 percent.

Although California growers faced wet conditions during planting last year, the effects of the rain have been more severe this year. Weather was favorable for planting in the southern San Joaquin Valley and Desert areas, but plantings have been delayed in northern growing areas. This may have prompted planting of additional acreage in southern California growing areas. Open weather this spring and summer (similar to last year), the use of earlier-maturing varieties, and contract incentives for later harvest could ameliorate some of the negative effects of this winter's rains.

It now appears that 1983/84 carryover stocks of canned tomatoes and tomato juice will be substantially above 1982/83. However, carryover supplies of some concentrated tomato products—especially paste—will be lower. If the March tonnage intentions are realized, a larger portion of production will probably go into the concentrated products. Even so, supplies of whole tomatoes and tomato juice will likely rise for 1983/84.

Wholesale prices of canned tomatoes and tomato products moved up slightly in April because of the uncertainty surrounding the 1983 crop. However, prices generally were substantially below a year earlier. Nevertheless, tomatoes and tomato product prices should be fairly

Table 25.—Canned tomatoes: Supply and disappearance

	1980/81	1981/82	1982/83
<i>Million cases 24/303's</i>			
Carryover	12.3	10.3	8.6
Pack	53.1	52.7	63.1
Total supply	65.4	63.0	71.7
Disappearance	55.1	54.4	

¹Unofficial ERS estimate.

Table 26.—Tomato paste: Supply and disappearance

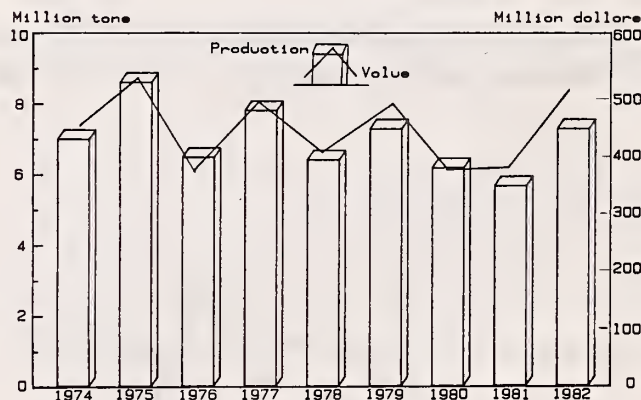
	1980/81	1981/82	1982/83
<i>Million cases 6/10's</i>			
Carryover	1,483	856	140
Pack	16,539	16,436	19,672
Total supply	18,022	17,292	19,812
Disappearance	17,166	17,152	

Table 27.—Tomato product imports

Year	Canned tomatoes	Tomato paste	Tomato sauce	Total
<i>1,000 pounds</i>				
1977	72.1	65.2	17.3	154.6
1978	74.1	51.0	7.1	132.2
1979	45.6	42.1	2.8	90.5
1980	39.9	25.5	1.7	67.1
1981	97.2	65.2	9.1	171.5
1982	167.0	198.0	21.8	386.8

SOURCE: Bureau of Census.

Processing Tomatoes: U.S. Production and Value



USDA

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steady in the coming months. An exception may be tomato paste; stocks on January 1 were only 14 percent of the 1982/83 supply. Weather developments in California between now and packing time will influence prices.

Highlights of the canned tomato products situation, by item, include:

—Stocks of canned tomatoes on January 1 were substantially more than a year earlier, while disappearance rose slightly during July-December. Cases of retail-size canned tomatoes (standard, 24/303) traded at \$7.50 in April, compared with \$9.60 a year ago.

—Paste stocks, while above last year's, were substantially reduced by January 1. Drums of paste (31 percent

Table 28.—Frozen broccoli: Supply and disappearance

	1980/81	1981/82	1982/83
<i>Million pounds</i>			
Carryover	78.7	76.3	55.5
Pack	290.7	306.8	¹ 335.0
Total supply	369.4	383.1	391.0
Disappearance	293.1	327.6	¹ 318.5

¹Unofficial ERS estimate.

solids) were quoted at 52 to 54 cents a pound, about 14 cents less than last year.

—Demand and stocks of juice, puree, and catsup posted strong gains through January 1 because of increased availability relative to 1982.

Other Vegetables

The California rains have affected the spring frozen broccoli and spinach packs. The broccoli pack through March ran 25 percent lower than a year ago. In addition, spring harvest area is down sharply, indicating a much smaller spring pack. However, carryover stocks on March 1 totaled moderately higher than a year earlier, which could at least partially offset a reduced spring pack. Nevertheless, price increases are likely in the coming months as supplies tighten.

Frozen spinach stocks on April 1 were 37 percent less than a year ago and the lowest for that date in 10 years.

Through March, the pack ran at less than half of the year-earlier pace. Spinach prices will also likely move up this spring.

Asparagus is primarily a spring crop, with production concentrated in California, Washington, and Michigan. The very wet conditions in California's Salinas Valley and Delta areas will likely reduce production there substantially. However, good conditions in Washington could ease the shortfall in California. In addition, both frozen and canned asparagus stocks this spring were sharply higher than last year.

POTATOES

Overview and Outlook

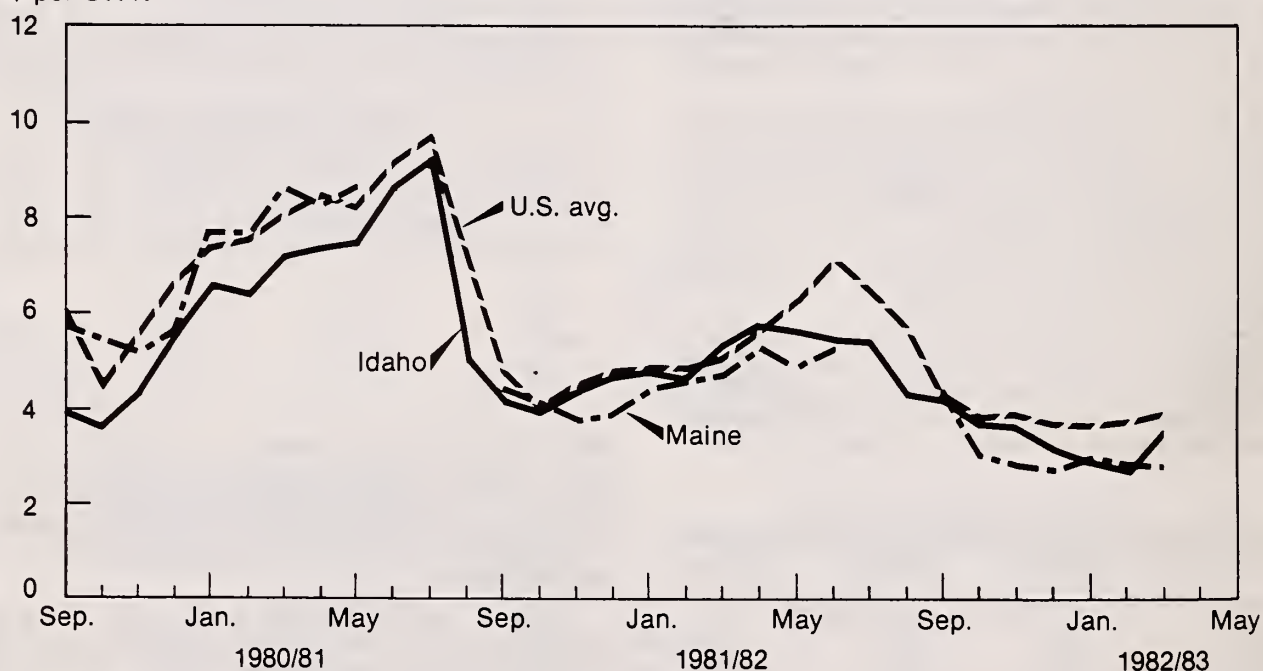
Prices Rebound After Low Winter Prices

The larger available supplies of potatoes this winter kept downward pressure on grower and retail prices. In addition, slowed demand by freezers, dehydrators, and chippers also limited grower price strength. However, depletion of some storages combined with the uncertainty of the rain-affected spring crop pushed up shipping point prices sharply in early April. Still, prices in some areas were at or below a year ago.

Larger remaining stocks from the fall crop offset the forecast smaller spring crop to leave total spring supplies virtually unchanged from a year ago (table 36). However, additional culling of frost-damaged potatoes from Idaho could lower the total.

Potatoes: Grower Prices, U.S. and Selected States*

\$ per CWT.



*Crop year.

Table 29.—Potatoes: April 1 total stocks by areas, 15 major States

Crop year	Eastern States	Central States	Western States	Total ¹
<i>Million cwt</i>				
1974	14.9	11.2	49.1	75.2
1975	11.2	7.2	52.6	71.0
1976	10.5	8.0	62.6	81.1
1977	12.5	14.1	62.1	88.7
1978	11.3	16.0	72.1	99.4
1979	14.1	13.8	64.7	92.6
1980	9.6	7.9	54.9	72.5
1981	10.4	13.1	58.4	81.9
1982	9.9	14.1	60.8	84.8

¹May not add to total due to rounding.

SOURCE: Potato Stocks, SRS.

Table 30.—Potatoes used for processing in major States¹

Season	To April 1	Entire season
<i>1,000 cwt</i>		
1977-78	82,915	123,975
1978-79	78,830	124,265
1979-80	75,090	115,645
1980-81	71,160	99,950
1981-82	87,001	127,004
1982-83	84,065	

¹Includes Idaho, Washington, Oregon, Maine, North Dakota, Minnesota, and Michigan from 1977-78 through 1980-81. Also includes Wisconsin beginning in 1981-82.

SOURCE: Potato and Sweetpotatoes Annual report, Estimated Potato Stocks, SRS.

Grower and retail prices will continue to rise seasonally through the spring as fall-crop potato stocks diminish. The reduced and delayed spring crop will also add to prices. Also, if the good tablestock demand exhibited since the beginning of 1983 continues, that would boost prices. Grower prices during April-June will likely average about \$5.00 to \$6.00 per cwt, compared with \$6.30 in 1982. The Consumer Price Index could average up to 10 percent less than in spring 1982, although it will be higher than this winter.

Other factors that will influence prices through this summer include general economic conditions and their effects on frozen potato product and potato chip demand. In addition, the timing of spring and summer crop harvests will affect prices. Delays in harvesting some of the spring crop could move prices up throughout the spring quarter. However, these late spring supplies could then compete with the early summer crop, forcing prices lower again.

Stocks, Disappearance Above a Year Ago

Recent developments with potato stocks and disappearance include:

—April 1 stocks of fall-crop potatoes held by growers, dealers, and processors totaled 85 million cwt, 4 percent more than a year ago (table 29).

—Disappearance of fall-crop potatoes through March was 209 million cwt, a 2-percent rise from a year earlier.

Table 31.—Pack of frozen potato products

Year	Million pounds	Year	Million pounds
1960	551	1972	2,594
1961	579	1973	2,691
1962	762	1974	2,985
1963	862	1975	3,001
1964	1,118	1976	3,335
1965	1,219	1977	3,623
1966	1,460	1978	3,849
1967	1,491	1979	4,090
1968	1,736	1980	3,853
1969	2,048	1981	4,236
1970	2,404	1982	4,377
1971	2,565		

¹Unofficial ERS estimate.

SOURCE: American Frozen Food Institute.

Increased culling, shrinkage, and use of potatoes for live-stock feed accounted for most of the increase. Culling has been heavy in Idaho because of frost-damaged potatoes.

—Strong winter demand for table potatoes has also aided the larger 1982/83 disappearance. January-March shipments from major growing areas ran 7 percent above 1981/82. Idaho has shipped at a record-breaking pace this season.

Processors' Use Down This Season

Through March, processors of primarily frozen and dehydrated potato products used 3 percent fewer potatoes than a year earlier (table 30). Stocks of frozen french fries and other frozen potato items were 6 percent more than a year ago on April 1 (table 10), which has caused the slowed processing.

The larger stocks indicate frozen potato product prices could continue stable in the months ahead. In addition, lower raw product costs and a slower rise in processing and marketing expenses this year will keep any price rises modest. Prospects for an economic upturn—which could help french fries sales—still appeared uncertain this spring.

The highlights of the processed potato product situation and outlook include:

—Northwest processors, who account for about 80 percent of all U.S. potato processing, used 6 percent less. Processing rose by 10 percent in the Central States and by 2 percent in Maine.

—The 1982 frozen potato pack probably totaled a record 4.38 billion pounds, compared with 4.24 billion in 1981. Strong processor activity in first-half 1982 offset the second-half decline (table 31).

—Per capita consumption of frozen potato products totaled 18.1 percent in 1982, compared with the record 18.2 pounds in 1982.

—In March, the BLS wholesale price index for frozen french fries stood at 291 (1967=100), versus 282 a year ago. The average U.S. retail price was 62 cents a pound, 5 cents less than last year.

—Use of chipping potatoes is down 12 percent. Use of potatoes for chips varies little from year to year, so some gains may be in the offing.

Table 32.—Potatoes: Prices f.o.b. shipping points and at terminal markets

Item	Week ended						
	1982			1983			
	Feb. 6	Mar. 6	Apr. 10	Jan. 3	Feb. 7	Mar. 7	Apr. 11
<i>Dollars per cwt</i>							
F.o.b. shipping points:							
New stock							
Florida, Dade County							
U.S. No. 1, Size A, round reds ¹	—	6.00	6.50	—	—	9.00	7.00
Old stock							
Colorado San Luis Valley							
Red McClures ²	8.00	8.00	8.00	6.50	6.50	6.00	6.00
Idaho, Idaho Falls							
Russets ³	14.37	13.90	14.50	11.50	11.50	12.75	19.00
Maine, Aroostook County							
U.S. No. 1 Size A. Mostly Katahdin ^{1, 4}	4.50	4.88	4.62	2.50	2.66	2.40	6.38
New York, Upstate							
Round white ¹	6.68	7.06	6.50	4.14	5.00	4.38	9.50
Michigan							
Round whites ¹	7.08	—	—	3.90	—	4.38	—
<i>Tuesday nearest mid-month</i>							
	1982			1983			
	Feb. 16	Mar. 16	Apr. 13	Jan. 11	Feb. 15	Mar. 15	Apr. 12
	<i>Dollars per cwt</i>						
Terminal markets:							
New York:							
New stock							
Florida, round reds ^{1, 5}	23.00	22.00	20.00	—	—	—	—
Old stock							
Long Island, various round whites ^{1, 5}	9.00	—	—	5.70	6.70	6.00	—
Maine, Katahdin ^{1, 4, 5}	8.70	9.30	8.50	—	—	6.30	10.00
Idaho, Russets ^{1, 5}	22.70	22.50	22.50	21.00	22.00	23.00	26.50
Chicago:							
New stock							
Florida, round reds ^{1, 5, 6}	12.00	9.50	9.00	—	9.00	12.00	8.75
Old stock							
Idaho, Russets ^{5, 6}	21.00	21.00	21.00	20.50	20.50	21.00	24.00
Minnesota-North Dakota, round reds ^{5, 6}	9.50	9.25	9.00	9.00	8.75	8.75	8.50

¹50-pound price doubled. ²2-inch up, washed. ³4-oz. minimum. ⁴2-inch minimum. ⁵U.S. No. 1, Size A. ⁶Street sales. F.o.b. prices are the simple averages of the mid-point of the range of daily prices.

SOURCE: Weekly summary of terminal market prices, AMS, USDA.

Table 33.—Potatoes: U.S. quarterly and season average prices received by growers

Year	1st	2nd	3rd	4th	Season average ¹
<i>Dollars per hundredweight</i>					
1977	3.52	4.31	4.19	3.10	3.55
1978	3.23	4.15	5.04	3.07	3.38
1979	2.93	2.97	3.42	3.33	3.43
1980	3.35	3.77	6.66	5.51	6.55
1981	7.67	8.59	7.19	4.36	5.41
1982	4.84	6.30	5.49	3.76	4.59
1983	3.72	25.00-6.00			24.75

¹Season average price of crop in indicated year. ²Unofficial ERS projection.

SOURCE: Agricultural Prices, SRS.

Table 34.—Quarterly retail price index of potatoes

Year	1st	2nd	3rd	4th	Season average ¹
<i>1967=100</i>					
1977	185.1	232.3	219.8	178.6	203.9
1978	186.7	211.3	256.0	193.3	211.8
1979	195.4	207.6	212.1	197.9	203.2
1980	203.5	219.4	316.9	295.4	258.8
1981	346.7	392.3	373.0	287.8	350.0
1982	295.7	323.8	323.8	242.0	296.3
1983	239.3	1260-300			1245-280

¹Unofficial ERS projection.

SOURCE: Consumer Price Index, Bureau of Labor Statistics.

Table 35.—Winter and spring potatoes: Acreage, yield, and production

Seasonal group and State	Acreage			Yield per acre			Production		
	Harvested		For harvest						
	1981	1982		1983	1981	1982	1983 ¹	1981	1982
	1,000 acres				Cwt			1,000 cwt	
Winter	11.6	11.0	11.0	189	206	203	2,198	2,263	2,230
Spring:									
North Carolina	13.3	13.8	13.8	155	160	140	2,062	2,208	1,932
Florida-Hastings	20.5	21.5	20.0	245	240	225	5,023	5,160	4,500
Other	1.0	1.2	1.2	240	210	165	240	252	198
Alabama	4.0	4.2	4.5	180	170	140	720	714	630
Louisiana	1.6	1.1	1.0	80	80	75	128	88	75
Texas	6.0	6.0	5.9	140	190	180	840	1,140	1,062
Arizona	5.2	4.7	4.9	280	305	270	1,456	1,434	1,323
California	26.4	25.5	24.5	390	375	330	10,296	9,563	8,085
Total	78.0	78.0	75.8	266	264	235	20,765	20,559	17,805

¹Indicated as of April 1.

SOURCE: Crop Production, SRS.

Spring Crop Down From A Year Ago

Because of late winter rains in many growing areas, this year's spring potato crop is currently forecast to be 13 percent less than 1982 and the second smallest on record (table 35). Production will be affected most by the decline in California's Kern County harvest, where some acreage was destroyed and weed control was a problem. In Florida's important Hastings district, fields showed considerable variability.

This year's winter crop was estimated to be slightly less than a year ago. Rainy weather in both growing areas, Florida and California, reduced yields and forced some acreage abandonment.

Low Prices Characterize Winter Markets

Because of the larger 1982 fall potato crop, grower and retail prices showed little change from fourth-quarter 1982 to first quarter 1983 (tables 33 and 34).

Other price highlights include the following:

- Prices during January-March averaged nearly a fourth lower than a year earlier. January's average of \$3.61 per cwt was the lowest since April 1980. Growers and shippers lowered prices to move the larger available supplies.

- During January-March, the Consumer Price Index for potatoes averaged nearly a fifth lower than last year. January's index of 236 was the lowest since May 1980.

- Many retailers took advantage of this winter's low prices and featured potatoes in their advertising campaigns, passing through the lower prices to the consumers.

- In general, prices held up the best for count-cartons of russet potatoes. Meanwhile, prices of round whites and reds declined the most relative to a year earlier.

No Major Changes In 1983 Acreage Likely

Despite lower 1982/83 prices, a major cutback in fall-crop acreage is unlikely. Growers seem to reduce plantings significantly only after sustained periods of low prices. The current cold-storage stocks position of frozen

Table 36.—U.S. spring potato supplies

	1981	1982	1983
	1,000 cwt		
April 1 stocks	72.5	81.8	84.8
Spring production	20.8	20.6	17.8
Total	93.3	102.4	102.6

potato products indicates processors might reduce their contract needs. However, the forecast economic upturn is expected to pick up momentum into 1984. This could serve to increase processors' needs and 1983 potato acreage.

SWEETPOTATOES

Prices Still Low; Smaller 1983 Crop In Prospect

Because of 1982's big crop—the largest since 1965—both shipping point and terminal market prices have remained sharply less than a year ago this season through mid-April (table 37). Prices will probably increase seasonally until this year's crop is marketed this summer.

In February, sweetpotato growers indicated they would plant 9 percent less area this year (table 38). Low cash returns during the 1982/83 season forced the cutback. Based on those intentions and typical yields and acreage abandonment, this year's output could be between 12 and 12-1/2 million cwt, compared with 14.6 in 1982. Such a production total would likely restore some strength to sweetpotato prices during 1983/84.

Other recent developments for sweetpotatoes include:

- The big 1982 crop and lower prices have caused a 20-percent rise in sweetpotato shipments from growing areas. Unloads in major terminal markets ran 10 percent ahead of last year's pace.

- Grower prices averaged \$8.12 per cwt during January-March, compared with \$17.20 a year earlier.

Table 37.—Sweetpotatoes: Prices f.o.b. shipping points and at terminal markets

Location and variety		Unit	Week ended						
			1982			1983			
			Feb. 6	Mar. 6	Apr. 10	Jan. 3	Feb. 7	Mar. 6	Apr. 11
<i>Dollars</i>									
F.o.b. shipping points	50 pound crate	10.25	10.50	10.50	4.63	4.25	4.00	—	
North Carolina									
S.W. Louisiana									
Porto Rico type U.S. No. 1, cured	50 pound crate	12.00	12.00	12.00	6.50	—	—	—	
California, Garnet	40 pound carton	11.00	13.60	15.80	—	10.30	11.80	12.60	
<i>Tuesday nearest mid-month</i>									
		Unit	1982			1983			
			Feb. 16	Mar. 16	Apr. 13	Jan. 11	Feb. 16	Mar. 16	Apr. 12
			<i>Dollars</i>						
Terminal markets									
New York									
Porto Rico, cured	50 pound carton	12.25	12.50	12.50	5.75	6.00	5.50	5.50	
Chicago									
Porto Rico, cured	50 pound carton	13.00	13.00	13.50	7.00	7.00	8.00	6.75	

SOURCE: Weekly summary of shipping point and terminal market prices, AMS, USDA.

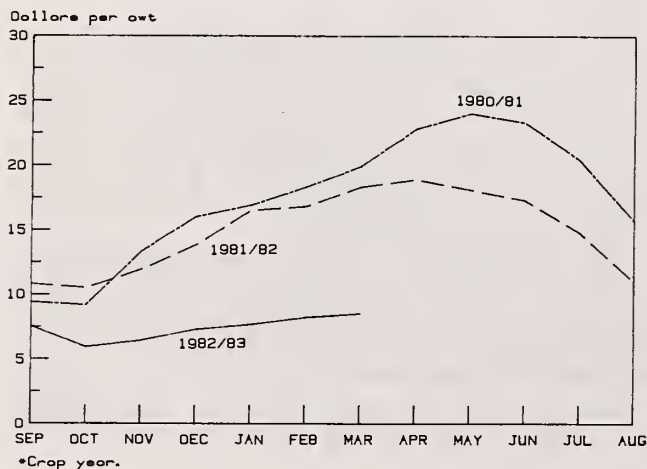
Table 38.—Sweetpotatoes: Planted and prospective acreage

Area	Acreage			
	1981	1982	Indicated 1983 ¹	1983 as percentage of 1982
	<i>1,000 acres</i>			<i>Percent</i>
Central Atlantic ²	6.2	6.5	6.3	97
Lower Atlantic ³	49.5	53.0	44.5	84
South Central ⁴	48.1	48.0	46.4	97
California	8.9	9.2	8.6	93
United States	112.7	116.7	105.8	91

¹Indicated as of February 1. ²New Jersey, Maryland, and Virginia. ³North Carolina, South Carolina, and Georgia. ⁴Tennessee, Alabama, Mississippi, Arkansas, Louisiana, and Texas.

SOURCE: Prospective Plantings, SRS.

Sweetpotatoes: U. S. Grower Prices*



USDA

Neg ERS 3074-83 (4)

—Canned sweetpotato stocks on January 1 were 23 percent larger than a year earlier. Larger carryover stocks and weakened demand caused the rise. The 1982/83 pack has gained slightly from a year ago. This spring, cases of most packs of canned sweetpotatoes were trading at moderately lower wholesale prices.

MUSHROOMS

Prices Improve; Processed Market Listless

Current developments in the mushroom industry include:

—At Kennett Square, Pennsylvania, grower prices for fresh and processed mushrooms advanced through the early months of 1983. Prices were higher than a year earlier and than fourth-quarter 1982 (table 39).

—The BLS producer price index for canned mushrooms stood at 185 (December 1967=100) for March 1983. The index has shown marked improvement from fourth-

Table 39.—Quarterly grower prices for mushrooms at Kennett Square, Pennsylvania¹

Year and type	1st	2nd	3rd	4th	Season average ¹
<i>Cents per pound</i>					
Fresh					
1981	67	69	70	62	68
1982	64	65	71	68	67
1983	70				
Processed					
1981	63	57	53	46	55
1982	49	49	49	47	49
1983	61				

¹Number 1, clean-cut mushrooms (in bulk for repackaging, fresh mushrooms).

SOURCE: Pennsylvania Department of Agriculture.

Table 40.—Processed mushrooms: U.S. production, stocks, sales, imports, and apparent consumption

	October-December		Marketing year	
	1981	1982	1980/81	1981/82
Beginning stocks ¹	25,099	19,900	28,140	28,751
Production ¹	27,227	21,871	100,361	98,341
Supply ¹	52,326	41,771	128,501	127,092
Ending stocks ¹	30,228	16,048	28,751	27,253
Sales ²	30,507	31,716	116,957	113,815
Imports ²	23,340	26,200	96,503	95,682
Apparent consumption ²	53,705	57,812	213,121	209,057

¹Canned mushrooms only. ²Canned and frozen mushrooms.

SOURCE: U.S. International Trade Commission, Publication 1351.

Table 41.—Canned mushroom imports, total and selected countries

Countries	July-June	July-June	July-Jan.	July-Jan.
	1980-1981	1981-1982	1982	1983
<i>Million pounds</i>				
China, People's Republic of	20.2	33.5	20.1	24.7
China, Republic of (Taiwan)	39.4	30.0	16.7	24.4
Hong Kong	21.4	21.4	13.0	7.1
Korea, Republic of	11.3	6.5	3.9	3.2
Other	3.0	3.5	1.5	2.0
World total	95.3	94.9	55.2	61.6

SOURCE: Bureau of Census.

quarter 1982, but it is still slightly below the comparable period a year earlier. In March, retail prices for fresh mushrooms averaged \$1.78 cents per pound, compared with \$1.86 a year earlier.

—Production, sales, ending inventories, imports, and apparent consumption of processed mushrooms all declined during 1981/82 (table 40). Production of canned mushrooms, at 98.3 million pounds (drained weight basis), was 2 percent less than in 1980/81. Ending inventories were down 5 percent, sales down 7 percent, and apparent consumption down 2 percent. The industry appears to be continuing its change from processed to fresh.

—During 1981/82, processed imports and their share of U.S. consumption changed imperceptibly. Canned imports from July through January were running 12 percent above the comparable period a year earlier. Imports from Taiwan and China chiefly account for this advance (table 41).

—The Department of Commerce is completing its study of the "dumping" charges against China. It should reach a decision on or around May 16.

PULSES

Dry Edible Beans

Prices Edge Up This Spring; Smaller 1983/84 Supplies in Prospect

Grower prices for dry beans during the first 3 months of 1983 were listless, averaging 34 percent below a year ago (table 42). Weak domestic and export demand has caused the price decline.

Through January of the current marketing season, total dry bean exports were off sharply from a year earlier (table 43), primarily because of the absence of sales to Mexico. However, white bean (Navy and Great Northern) exports are ahead of last year's pace.

Prices have edged upward this spring. Dealers' inventories are reportedly low, and they have to bid up grower prices to replenish their stocks. However, demand continues weak, and will limit any price advances. Grower prices will likely continue to move up from this winter, but still average less than a year ago. A prospective decline in the 1983 crop could boost prices later in the year.

Growers, in response to low prices and uncertain markets, indicated in February they will reduce plantings by 22 percent (table 44). That planted area would be similar to typical planted acreage before 1980, the year that Mexico contracted for large quantities of beans. If the February planting intentions are realized, production would likely range from 19 to 21 million cwt, compared with 24.8 million in 1982.

Recent dry bean price and export developments include:

—Dealer f.o.b. prices for different types of beans showed little life. Only small reds sold at prices comparable with last year.

—Navy beans this spring sold for half the price they received in early 1982.

—Grower prices for pintos through mid-April were being pressured upward. Supply, rather than demand, is the cause. Dealers have low inventories because growers aren't selling. Pintos were quoted at \$11 to \$12.50 in late March, moderately less than a year earlier.

Table 42.—Dry edible beans: U.S. quarterly and season-average prices received by growers

Year	1st	2nd	3rd	4th	Season average ¹
1977	14.87	16.93	15.50	22.90	20.20
1978	21.73	19.53	16.40	16.57	17.30
1979	17.30	18.73	20.73	21.50	22.80
1980	24.76	23.03	25.53	26.00	27.60
1981	28.60	34.20	28.33	23.17	21.00
1982	20.07	18.17	15.23	13.73	13.80
1983	12.07	² 13.50-14.50			² 20.00

¹Season-average price of crop in indicated year. ²Unofficial ERS projection.

SOURCE: Agricultural Prices, SRS.

Table 43.—U.S. pulse exports

Crop/Variety	Total seasonal ¹		Year to date ²		1983 as percentage of 1982
	1980/81	1981/82	1981/82	1982/83	
<i>Million pounds</i>					
Dry beans					
Navy	232.9	177.0	95.7	127.8	134
Great Northern	141.6	154.8	81.8	85.9	105
Pinto	764.2	745.8	568.8	16.3	3
Other	322.6	420.1	202.2	98.9	49
Total	1,461.3	1,497.7	948.5	328.9	35
Dry peas	280.4	237.7	108.3	133.9	124
Lentils	159.2	158.7	56.2	58.4	104
Total pulses	1,900.9	1,894.4	1,113.0	521.2	47

¹September-August crop year. ²Through January.

SOURCE: Bureau of Census.

Table 44.—Dry edible beans: Planted and prospective acreage

State	Planted area		Indicated 1983 ¹	1983 as percentage of 1982
	1981	1982		
1,000 acres				
California	235.0	248.0	170.0	69
Colorado	190.0	175.0	165.0	94
Idaho	246.0	143.0	120.0	84
Michigan	650.0	560.0	450.0	80
Nebraska	240.0	225.0	190.0	84
North Dakota	430.0	300.0	200.0	67
Other ²	351.0	252.5	190.5	75
Total	2,342.0	1,903.5	1,485.5	78

¹Growers' intentions as of February 1. ²Includes Kansas, Minnesota, Montana, New York, Utah, Washington, and Wyoming.

SOURCE: Prospective Plantings, SRS.

—The prospects of any exports to Mexico are slim at best. Mexico is reportedly exporting beans to Cuba this year. However, stocks are being worked off and Mexico could be back in an important buying position in 1983/84.

—Canadian pea bean stocks were down to 148,000 cwt at the end of March. This could be a plus for U.S. exporters who would be able to fill market vacuums resulting from the depletion of Canadian stocks.

Dry Edible Peas

Pea and Lentil Prices Move Up Slightly

Recent developments in the dry pea and lentil situation include:

—Grower prices for green and yellow peas edged higher in March (table 45). They are still below year-earlier levels, but they have begun a weak seasonal advance. Growers have sold green and yellow peas to dealers who bid up prices to augment inventories.

—Yellow pea and Austrian winter markets grew stronger over the winter. Good export demand from Taiwan for Austrian winter peas helped firm prices. In addition, a demand for these varieties as a cover crop for Payment-In-Kind (PIK) acreage accounted for some slight improvement.

—Lentil prices, though weak when compared with last year, have risen. Growers are keeping a tight hold on supply, and export sales to Germany have helped to firm f.o.b. prices. However, with increased competition from Turkey and Canada, no major gains in the lentil market appear likely in the near future. Turkey recently captured the entire Algerian tender of 22,000 tons.

—Some seasonal improvement in prices should be seen through spring and summer. Overall, grower prices for dry peas and lentils will likely remain moderately below 1983.

Table 45.—Grower prices of dry edible peas and lentils

Crop	1982			1983		
	Jan.	Feb.	Mar.	Jan.	Feb.	Mar.
<i>Dollars per cwt</i>						
Green peas	10.65	11.70	12.20	8.95	8.55	9.05
Yellow peas	9.70	10.10	10.35	8.00	7.75	7.95
Lentils	15.75	16.90	16.60	13.05	12.15	12.05

SOURCE: Grain Market News, Denver, AMS, USDA.

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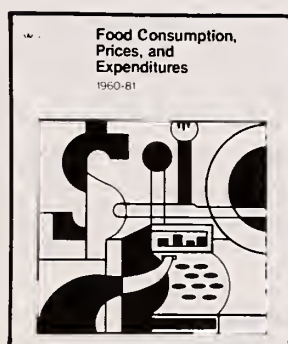
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